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ADJUSTMENTS USER MANUAL

ADMINISTRATION

INTRODUCTION

The Adjustments administrator can:

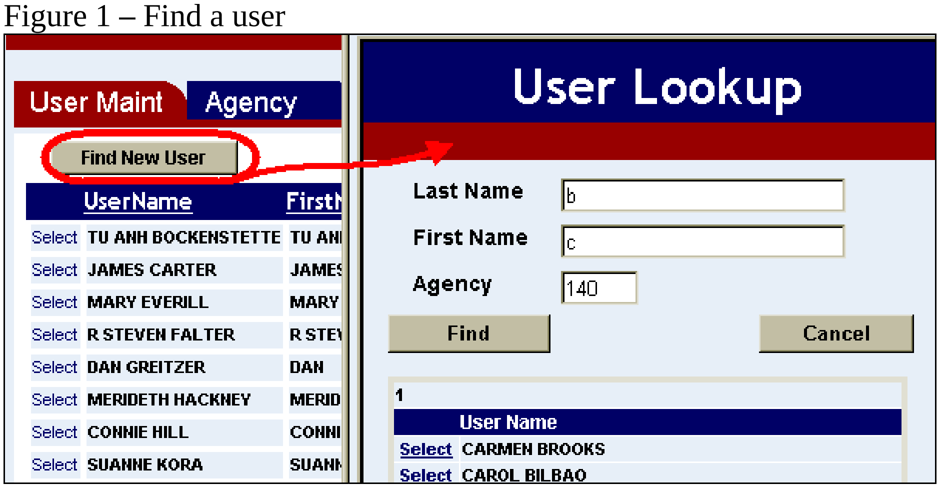
- Add new users to the Adjustments application.
- Update existing users.
- Create the number of and name of approval levels for the agency.
- Set the default screen that is seen by all users when they open the Adjustments application.

ADD A NEW USER

The administrator finds a new user and then assigns the user's security or role.

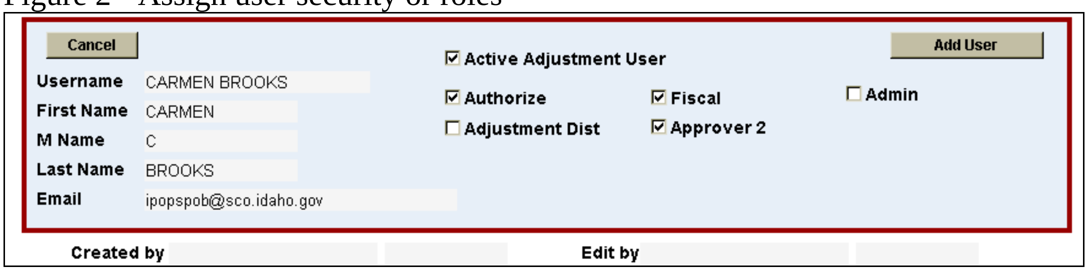
1. On the **User Maint** tab, Click **Find New User**.
2. In the **User Lookup** dialog box, type the last name of the new user in the **Last Name** field. (You can type the first few letters of a user's name if you are not sure how it is spelled.)
   a. To add an employee from another agency, type the last and/or first name and enter their agency number in the **Agency** field.

Figure 1 – Find a user



3. Click **Find**. If the user cannot be found, contact your payroll administrator to make sure that the person has been added to state payroll records.
4. Click **Select** next to the user's name to add and then click **OK** to confirm adding the user.
5. Select the security or roles that you want to assign to the user. (Set up the names of the approval levels on the **Agency** tab – see below.)
   b. Select **Active Adjustments User** to give the user access to the Adjustments application.
   c. Select the other security or roles to assign to the user which gives them the ability to perform the related functions in the application. The security settings include:
      - **Authorize**. User can authorize ("pre-approve") adjustment transactions. NOTE: If you select **Auto Authorize Adjustments** on the **Agency** screen (see below), you will not have to select **Authorize** for your users.
      - **Adjustment Dist**. User can enter fiscal coding and cost distribution of adjustment transactions.
      - **Approval Levels**. User can approve adjustment transactions up to the approval levels selected. Again the names of the approval levels are set up on the **Agency** tab (see below).
      - **Admin**. User has full administrative access to the application.

Figure 2 - Assign user security or roles



6. Click **Add User**. (If you decide not to add the user, click **Cancel**).

UPDATING A USER

Administrators are responsible for updating the users of the application. (NOTE: Users are responsible for updating their own e-mail address – they do this on the Statewide Accounting System main menu.) There is no feature to delete a user. To update a user:

1. On the **User Maint** screen, click **Select** next to the name of the user.
2. Select **Active Adjustments User** to give the user access to the Adjustments application. Uncheck **Active Adjustments User** if you do not want the user to have access to application (use this instead of deleting a user from the application).

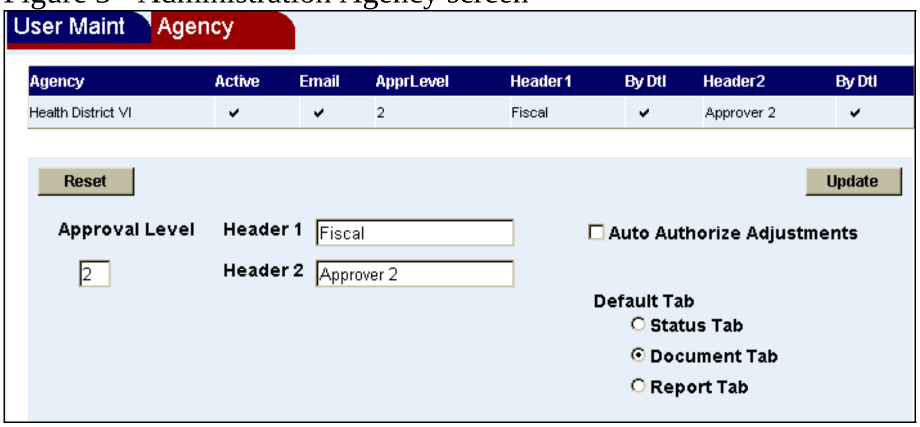
3. Select or deselect the security or roles that you want to assign to the user.
4. Click **Update User**.

SETTING UP YOUR AGENCY

Click the **Agency** tab to set up and maintain various features of the application specific to your agency, such as the names and number of the approval levels.

1. Enter the number of approval levels needed by your agency in the **Approval Level** field. Up to five approval levels can be created.
2. Type **Header** names for each approval level. These will be the names of the approval levels that you will see on the **User Maint** screen and that approvers will see on the **Approval** screen. They also are printed on reports.

Figure 3 - Administration Agency screen



3. Uncheck the **Auto Authorize Adjustments** check box if you want your users to authorize an Adjustment document before it can be approved. If unchecked, you must assign the **Authorize** security to individual users on the **User Maint** screen (see above). Check the check box if you want Adjustment documents automatically authorized when they are saved.
4. Select the **Default Tab** to set which screen opens when users open the Adjustments application.
5. Click **Update**.